

## 4.3 ID MATRIX

### Introduction

The ID Matrix screen allows you to:

- View item data for an ID in a matrix (columns/rows) format, for a specified stat period
- View different versions of the data: reported, edited, adjusted, weighted-adjusted
- Edit item data for the current stat period
- Run the edit for a single ID
- Derive data for a single ID
- Weight data for a single ID
- Run simple imputation for a single ID
- Access the Notes screen for an ID

The ID Matrix screen differs from the ID by Item screen, by giving you some control over how the data will be displayed on the screen. You can specify (in the Item Data Dictionary) the row and column for a particular item, which will determine its placement on the screen. In addition, the ID Matrix screen allows you to view different versions of the data: reported, edited, adjusted, and weighted-adjusted. Only data for the current stat period is displayed.

## Accessing the Screen

- ! Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.
- ! From the Review and Correction Main Menu, choose a selection set to process. (See Chapter 4.1 for more information on accessing and creating selection sets.)
- ! Select the GOTO pmenu option.
- ! Select “Item Data”.
- ! Select “ID Matrix”.

Figure 4.3 ID Matrix Screen

## Screen Features

### 4.3.1 CONTROL INFORMATION SECTION

The ID Matrix screen consists of 2 parts: a Control Information section and an Item Data section. The Control Information section is identical to that which is displayed on the ID by Item screen. Please refer to Section 4.2.1 for a complete list of fields and corresponding definitions.

### 4.3.2 ITEM DATA SECTION

The Item Data section contains the item data for the ID specified in the Control Information section. Data is displayed according to the column and row specified in the Item Data Dictionary. Unlike the Item by ID screen, data is displayed for the current stat period only. Additional stat periods specified in the Review and Correction Main menu cannot be viewed from the ID Matrix screen.

You are provided with 3 display options in the ID Matrix screen:

OPTION	FUNCTION
Hide Item Codes	Indicates whether the item code/mnemonic is to be displayed in the matrix data table. Click on the “Hide item codes” button if you do not want to see the item code/mnemonic associated with the item data.
Hide Data Flags	Indicates whether the data flag is to be displayed in the matrix data table. Click on the “Hide data flags” button if you do not want to see the data flag associated with the item data.
Type of Data to View	Indicates which version of the item data is to be displayed in the matrix data table: reported, edited, adjusted, or weighted-adjusted. Click on the arrow to display a pick list of valid data types from which to choose.

Column headings include ITM(*n*), FLG(*n*), RP(*n*), ED(*n*), AD(*n*), WD(*n*), where ‘*n*’ represents the column # (as specified in the Item Data Dictionary) for the item, data flag, and data version. See below for detailed descriptions of each.

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#### ITEM (ITM)

- ! The 5-character item code or mnemonic (defined in the Item Data Dictionary) will be displayed, unless you click on the “Hide item codes” button.
- ! The order in which the item codes are displayed is controlled by the row (ROW) and column (COL) fields specified in the Item Data Dictionary. (See Chapter 2.1.1, Item Data Dictionary, for more information on specifying a ‘column’ and ‘row’.)
- ! Click on the item code to access a complete description of the item.
- ! Add an item to this screen by selecting the “Add item” option from the EDIT pmenu. Items must already be defined in the Item Data Dictionary before you can add them here. (See Chapter 4.9 for detailed information on the Add Item screen.)

#### DATA FLAGS (FLG)

- ! Associated with each item value is a data flag. Data flags are used to identify the source of the edited data item value. Data flags will be displayed unless you click on the “Hide data flags” button. See Section 4.2.2 for a complete list of data flags and corresponding definitions.
- ! When you edit data in an item field, the Data Flag screen will automatically display. Press <ENTER> to select the default flag of ‘A’ for ‘analyst correction’.
- ! If you do not want to use the default data flag, select another using the mouse. Some data flags are set by various programs within StEPS. Your data flag choices will be limited to those that are correctable by ‘analysts’ only.
- ! You cannot change a data flag unless you have edited the item data.

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## DATA VERSIONS (RP, ED, AD, WD)

You can choose the version of data you wish to view using the “Type of data to view” button. Listed below are the 4 different data types and corresponding definitions:

<b>Reported (RP)</b>	Item data reported by the respondent; received through batch update.
<b>Edited (ED)</b>	Item data that has not been ‘weighted’ or ‘adjusted’. Edited data can be identical to the ‘reported’ data of the respondent, or it may reflect changes to the reported data as a result of imputation or analyst correction.
<b>Adjusted (AD)</b>	<p>For a reporting unit for a specific statistical period, data that incorporates an adjustment factor to compensate for differences between the time periods of the reporting unit and the survey; typically used for monthly surveys to adjust reports which reflect 4- and 5-week time periods. The adjustment flag (ADJFLG) in the Item Data Dictionary must equal ‘Y’ in order for data to be adjusted. This field is computed as EDDATA * reporting adjustment factor.</p> <p>For those items that are not adjusted, this field will be identical to the edited data (ED) field. Changing an edited data value will not update the adjusted value. The AD field will only contain <u>current</u> adjusted data if the adjustment module is run.</p>

**Weighted-adjusted (WD)** For weighted items indicated by WGTFLG = 'Y' in the Item Data Dictionary, weighted data is computed as  $ADDDATA * WGT$  (from stat period control file) or  $ADDDATA * WGT * GWWGT\#$  (where # = 1, 2, or 3 as specified in corresponding Item Data Dictionary entry for gweight indicator-GWTNUM).

For those items that are not weighted, this field will be identical to the adjusted data (AD) field. Changing an edited data value will not update the weighted value. The WD field will only contain current weighted-adjusted data if the weighting module is run.

**NOTE:** Only the EDITED version of the data is correctable. ('REPORTED' data is generated from batch update; 'ADJUSTED' and 'WEIGHTED' data are calculated from EDITED data using other programs.)

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### **SURVEY, ID, ROW**

The last 3 columns of the ID matrix table contain the following fields:

Survey	Identifies the survey currently being processed
ID	Identifies the ID currently being processed
Row	Identifies in which 'row' of the matrix table, the item is to be displayed; the 'row' is specified in the Item Data Dictionary

### **4.3.3 MAKING CORRECTIONS**

! Corrections can only be made to edited data. Before attempting to make a correction, be sure you have selected the correct data version from the "Type of Data to View" pick list. If you attempt to make a correction to any of the other data versions (reported, adjusted, weighted-adjusted), an error message will display: "You may not modify this field."

! You can correct the 'edited' version of the data provided:

1. You have the proper privileges to correct data (DATAPRIV = 'U' or 'P').
2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG = 'U' or 'P').

An error message will display if you attempt to correct a field that is not correctable or if you do not have the proper privileges.

- ! Click on the data field you want to correct to access the Single Item Update screen:

The screenshot shows a SAS window titled 'SAS: AF' with a subtitle 'Single Update Frame'. The main content area has a grey background and displays the text 'DISCLOSURE PROHIBITED - TITLE 13 U.S. CODE' and 'Single Item Update'. Below this is a form with several input fields: 'ID' containing '0000011111', 'Item' containing '10351', 'Statper' containing '1998A1', 'Value' (empty), 'Flag' (empty), and 'IMPACT' (empty). At the bottom of the form are two buttons: 'Update' and 'Cancel'.

Figure 4.3.3a Single Item Update

1. The current ID, item, and stat period are displayed. These fields are not correctable.
2. Enter the item value in the Value field and press <ENTER>.
3. The data flag window will display. Press <ENTER> to accept the default data flag of “A” (‘analyst correction’), or select a different flag using the mouse.
4. You have the option of entering an imputation action flag (IMPACT). The imputation action flag controls whether an item value is to be imputed. Values include:

blank	Follow imputation rules to determine whether to impute or not (default)
Y	Impute, regardless of imputation rules
N	Do NOT impute, regardless of imputation rules (even if failure)
X	Follow rules to impute, but exclude from imputation base

You are not required to enter a value in the IMPACT field.

5. Press <ENTER> or click on the UPDATE button to apply the correction.
6. Press <CANCEL> to cancel the update. The item will revert to its original data value.

- ! Any correction that you make is immediately applied to the database.

- ! If you enter data for an ID that has no check-in date, you will be prompted to enter one when you exit the ID Matrix screen:

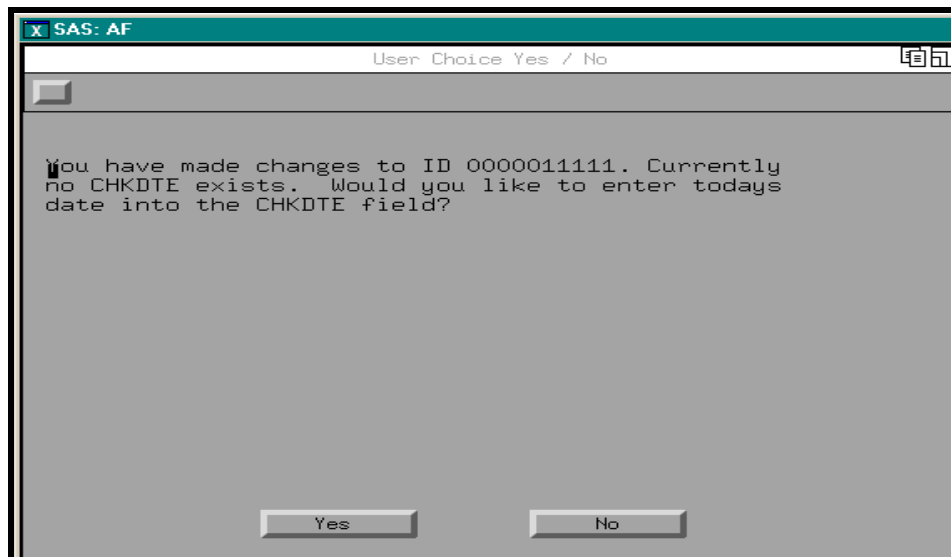


Figure 4.3.3b Check-In Date Confirmation

1. Click on “Yes” to have today’s date inserted into the check-in date field.
2. Click on “No” if you do not want to insert today’s date into the check-in date field.

! An audit trail will be created for all corrections applied to the database. The following fields will be included in the audit trail:

SURVEY	Survey name
STATP	Statistical period
ID	Case ID
ITEM	Item code/mnemonic
OLDFLAG	Data flag before change
NEWFLAG	Data flag after change
OLDVAL	Value of item before change
NEWVAL	Value of item after change
USRNME	Name of user who made the change
PRGNME	Name of program to update the value
PRGDTM	Date/time the update took place

! To access the Item Audit Trail:

1. Click on “Item Data” from the GOTO pmenu.
2. Click on “Audit Trail”.
3. Choose “Item Audit by ID” or “Item Audit by Date”.

#### 4.3.4 RUN SINGLE ID EDIT

! Run a simple edit on the ID by clicking on the EDIT pmenu and selecting the “Run edit” option.

- ! Edit tests that have been defined in the Edit Definitions (See Chapter 8) as active for the “Single ID” test will be run. If the ID fails any of the single ID edit tests, the following message will display, indicating the number of rejects:

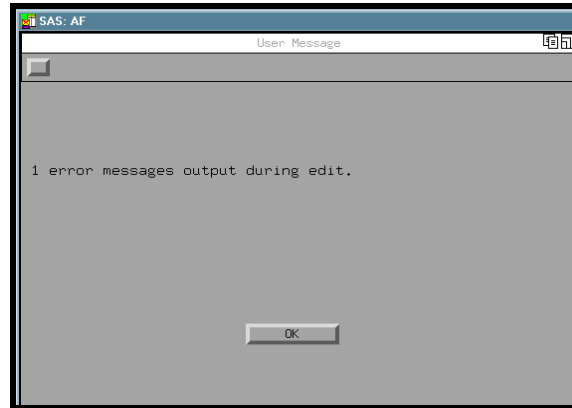


Figure 4.3.4a Number of Edit Rejects Screen

- ! Click on “OK” to display the edit reject messages:

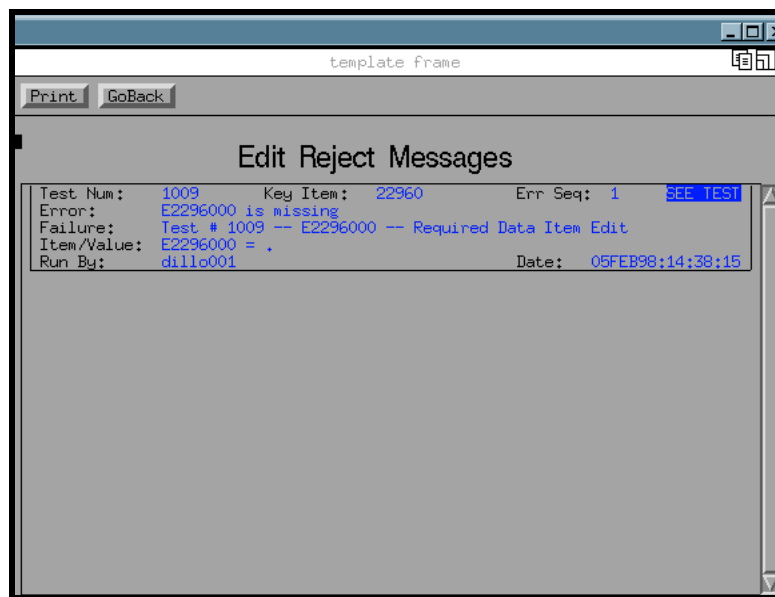


Figure 4.3.4b Edit Reject Message Screen

Test Num	Edit test number as defined in the Edit Definitions screen
Key Item	Item code of key item in test
Err Seq	Sequence number of edit reject (i.e., '3' is 3 <sup>rd</sup> edit failure, '5' is 5 <sup>th</sup> edit failure) in edit run
Error	Edit reject message as defined in the Edit Definitions screen
Failure	Test #, key item, and type of edit failure (i.e., List Directed, Balance,



Item/Value	Required Item)
Run by	Key item and its corresponding value
Date	User name of person to last run the Single ID edit test
	Date the Single ID edit test was run

- ! The Edit Reject Message screen is for viewing purposes only. You cannot correct the rejects on this screen. Data corrections must be made in one of the Review and Correction screens (i.e., ID by Item, ID Matrix).
- ! Click on the PRINT button at the top of the screen to print the edit rejects for the ID.
- ! Click on the GOBACK button at the top of the screen to return to the ID Matrix screen.
- ! Click on “SEE TEST” (in the upper right corner of the test block) to access the actual parameter entry for the test:

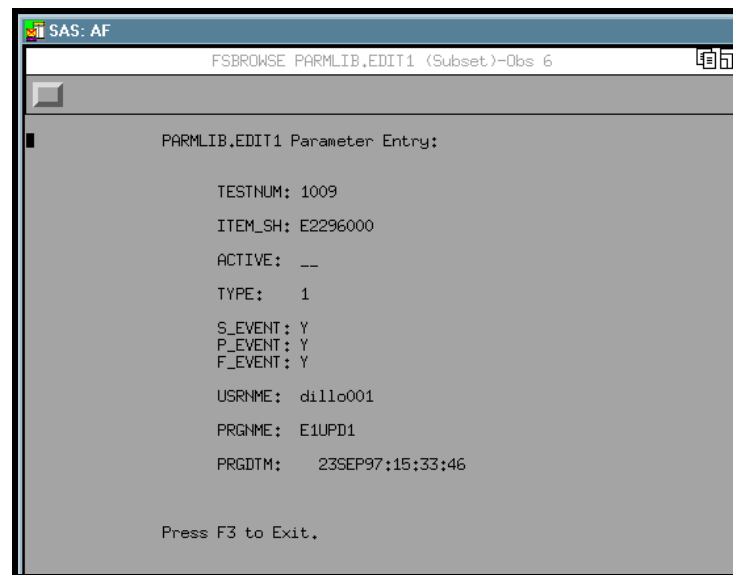


Figure 4.3.4c Edit Parameter Screen

TESTNUM	Edit test number as defined in the Edit Definitions screen
ITEM_SH	Key item (item code with prefix and suffix)
ACTIVE	Indicates whether or not the test is active (blank = active, N = not active)
TYPE	Type of edit test as defined in the Edit Definitions screen (i.e., '1' = Required Item, '2' = Range, '3' = List Directed)
S_EVENT	Indicates whether test is active for the Single ID edit
P_EVENT	Indicates whether test is active for the Pre-edit
F_EVENT	Indicates whether test is active for the Full edit
USRNAME	Identifies user who last updated the edit test definition
PRGNME	Identifies the program used to update the edit test definition
PRGDTM	Indicates the date the program to update the edit test definition was run

! If edit rejects are identified through the “Run edit” option on this screen, a ‘W’ will be displayed in the ID Flags field in the Control Information section. The ‘W’ indicates that single ID edit rejects exist for this ID. At any time, you can click on the ‘W’ to display a list of the edit rejects, as shown in Figure 4.3.4b. The “W” will remain in the ID Flags field until you correct all rejects and rerun the edit.

! Press F3 to exit this screen. (See Chapter 8, Edits, for more information.)

#### **4.3.5 WEIGHT ITEMS**

Some IDs have weights. If you make changes to the edited-unadjusted data, the weighted data will not reflect these changes, unless you re-weight the data.

You can weight the item data for an individual ID or for all IDs at one time. To weight items for the ID specified in the Control Information section, select the “Weight items” option from the EDIT pmenu.

If you prefer to make corrections to many IDs and then weight the data for the whole survey all at once, you can do so using the “Estimation” option in the RUN PROCESSES module. You must have the proper privileges to run the weight program for the entire survey.

#### **4.3.6 DERIVE ITEMS**

Some IDs have derived items. Derived items are items that are not actually collected for a survey, but that are calculated or derived from other items. These other items may be items that are on the form or may be derived items themselves. If you have made changes to edited-unadjusted data, your derived item values will not reflect these changes, until you run the derived item program.

You can derive the item values for an individual ID or for all IDs at once. To derive items for the ID specified in the Control Information section, select the “Derive items” option from the EDIT pmenu. If you prefer to make corrections to many IDs and then derive items for the whole survey all at once, you can do so using the “Derived” option in the RUN PROCESSES module.

After the program has run, a message will display, indicating that the run has been completed. The program will assign derived item values a data flag of ‘D’ or ‘V’. ‘D’ indicates that the derived item value is to be treated as reported data. ‘V’ indicates that the derived item value is to be treated as imputed data.

#### **4.3.7 RUN SIMPLE IMPUTATION**

Run simple imputation on the ID by clicking on the EDIT pmenu and selecting the “Run Simple Imputation” option. Simple imputation tests that have been defined in the Simple Imputation module as active will be run. (See Chapter 9 for more information on Imputation.)

When the program has finished executing, a message will display, indicating that the run has been completed. The program will assign imputed item values a data flag of ‘E’. ‘E’ indicates that the imputed item value is to be treated as reported data.

#### **4.3.8 RUN SIMPLE IMPUTATION AND EDIT**

Run both the simple imputation AND the edit on the ID by clicking on the EDIT pmenu and selecting the “Run Simple Imputation and Edit” option. See Sections 4.2.4 and 4.2.7, above, for more information.

## P-Menus

P-Menu	Options	Function
EDIT	Add item Display all form items Delete current items with no data Run edit Derive items Weight items Run simple imputation Impute and edit	Add an item record to the ID Display all items from form, even if no data exists Do not display items that have no data Run the single ID edit Calculate derived items for ID Weight items for ID Run simple imputation for ID Run simple imputation for ID and then edit
UTILITIES	Next ID (F5) Previous ID (F4) Next page (PgDwn) Previous page (PgUp) First ID Last ID Print	Access next ID in selection set Access previous ID in selection set Access next screen of data for ID Access previous screen of data for ID Access first ID in selection set Access last ID in selection set Print ID by Item screen
GOTO	Control Data ➤ Control Information Collection History Status Changes Mail Group Audit Trail ➤ Control Audit by ID Control Audit by Date  Item Data ➤ ID by Item ID by Item2 Item by ID Historical Data Audit Trail ➤ Item Audit by ID Item Audit by Date  Respondent Text  Notes	Access Control Information screen for this ID Access Collection History screen for this ID Access Status Changes screen for this ID Access Mail Group screen Access Control Audit by ID screen for this ID Access Control Audit by Date screen  Access ID by Item screen for this ID Access ID by Item2 screen for this ID Access Item by ID screen (for selected item) Access Historical Data screen for this ID Access Item Audit by ID screen for this ID Access Item Audit by Date screen  Access Respondent Text screen for this ID  Access Notes screen for this ID
HELP	ID Matrix Help (F1)  Correcting Data Function Keys  WhoamI (F7)	Display HELP information on using the ID Matrix screen Display instructions for updating an item record Display list of function keys and corresponding descriptions Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen